

The Engagement Framework.

A model: how a strategic account is run — who is in the room, how escalation works, what meets when, how the partnership is scored, what support, services and releases promise in writing, and how adoption is taken to the field. With the document you hand the customer.

A model for one account.

The [Operating Model](#) says how a Customer Success organization is built. This model says how a single strategic account is built — the dedicated tier, one manager to seven accounts, where the relationship is large enough to deserve its own written constitution. It is a document a vendor hands a customer, and then both of them live by it. The template beside this manual is that document.

VERSION	DATE	AUTHORITY	NOTES
1.2	October 2026	Juan Carlos González II	Terminology generalized to the Operating Model's: the Customer Success Executive and the three divisions that report through it — Customer Support, Success Management, Professional Services — with Account Management beside; the four standing meetings renamed; the Steering Committee and its charter rewritten
1.1	October 2026	Juan Carlos González II	First public edition, rebuilt as a Juan.co model; the vendor's product-specific mechanics generalized; "what scales down" and the first ninety days written; the template with placeholders
1.0	January 2016	Juan Carlos González II	Devised as Director of Customer Success at a staffing-software company as the "Operating Framework" for its strategic and enterprise accounts; the six partnership dimensions that became the Partnership Maturity Model were first written here

HOW TO USE THIS MODEL

Read pages 4–5 once, for what the framework is and which of its parts survive outside the dedicated tier. Pages 6–12 are the framework itself, one component per page, in the order the customer reads them. Page 13 is the first ninety days and the checklist. Then open the template, fill in the brackets with the customer in the room, and review it together every quarter.

TERMS OF USE

© 2026 Juan.co LLC. All rights reserved. Published at juan.co/playbooks. Free to read and to use within your own organization, with attribution; not for resale, republication, or use in a paid service without permission. Tell me where it is wrong: juan@juan.co.

● CONTENTS

What is inside.

I • Why	4
A document you hand the customer	4
What scales down	5
II • The Framework	6
Who is in the room	6
The operating executive	7
Standing meetings	8
Six dimensions	9
Support, promised in writing	10
Services and releases	11
The adoption program	12
III • Running It	13
The first ninety days, and the checklist	13

A document you hand the customer.

In 2016 I ran Customer Success for a software company whose largest customers were larger than most of its departments. Each of them had a dozen people on our side touching the account, and nobody on their side knew who any of them were, who to call when something broke, or what we had actually promised. So I wrote it down, and handed it to them.

The Operating Framework — I called it that then; it is an engagement framework, and that is its name here — is a twenty-page document, written per account, that says how the engagement will operate: who is on the account on both sides and who each person's peer is; who the one operating executive is and how escalation reaches them; which meetings stand and how often; the six dimensions on which the partnership is scored every quarter; what support promises by severity, what services look like, how releases are announced; and how adoption is taken to the customer's offices in waves. The customer's own priorities sit on page two, mapped to the parts of the framework that answer them. Then both companies live by it, and review it together in person every quarter.

Two things made it work, and both are in the opening paragraph of the original. The first is **transparency about the gap**: the framework described service levels we were still in the process of achieving, said so, and gave the goal and the timeline, so that the customer could hold us to them — which is the only way a promise becomes a relationship. The second is that it was **written for the customer, not about them**: no internal process appears unless the customer can see it, call it, or escalate through it.

WHAT IT IS

A constitution for one account

Roles, escalation, cadence, scoring, promises. One document, filled in per account, reviewed quarterly, owned by one named person on the vendor's side.

WHO IT IS FOR

The dedicated tier

Accounts large enough to have a named Customer Success Executive, a steering committee and field visits — in the Operating Model's terms, the top of the book, one manager to seven. Below that tier, parts of it survive; the next page says which.

WHAT IT IS NOT

A contract, or a plan

The contract says what was bought. The success plan says what the customer is trying to achieve this year. The framework says how the two companies will work together while they do it — and it changes less often than either.

What scales down.

The framework was written for strategic accounts, and I would not pretend it is a universal engagement model. But every component of it has a shared-tier and a digital-tier form, and knowing which parts collapse and which disappear is most of what it means to design the lower tiers well.

COMPONENT	DEDICATED · 1:7	SHARED · 1:30	DIGITAL · 1:100
Rosters and peers	Three rosters, every person with a named peer	One roster: the CSM, the champion, the executive sponsor	A named inbox and a status page
Operating executive	A Customer Success Executive per account or cluster	The CSM, with a director behind them for escalation	Support leadership; no named individual
Escalation paths	Written per account, three steps to an executive	The same three steps, published once for the tier	Published once for everyone; the severity table carries it
Standing meetings	Weekly account tracking, weekly support, a business review in person every quarter, a product update per release	Quarterly touchpoint, semi-annual review, quarterly reporting	Digital engagements on triggers; no standing meetings
Six dimensions	Scored jointly every quarter, with a steering committee	Scored at every review — the Partnership Maturity Model	Three of six, from data: adoption, support quality, program
Executive dashboard	A shared document, reviewed weekly	The health score and the open items, reviewed at touchpoints	The health score
Support promises	Dedicated analysts, named; severity table with hourly follow-ups	The same severity table; concierge queue, no named analyst	The same severity table; standard queue
Services	A program manager over every project	Project managers per engagement	Packaged services, self-service enablement
Release communication	The published rhythm plus a named touchpoint per stage	The published rhythm	The published rhythm
Adoption program	Chartered waves, field visits, usage data by segment	Adoption workshops on signal; usage data on request	Learning center; usage nudges in product

Teal survives intact; slate collapses to a lighter form; coral disappears or becomes a system. The three rows that are teal all the way across — escalation, severity, release rhythm — are the vendor's promises, and they should be identical for every customer; the framework only makes them personal.

II • THE FRAMEWORK

Who is in the room.

The framework opens with the customer's priorities and three rosters. Before anyone reads a service level, they can see who is accountable to them, by name, and who their counterpart is on the other side.

PAGE TWO

The customer's priorities

The year's major themes for the partnership, in the customer's words — four or five, no more — each mapped to the components of the framework that answer it. This table is written *with* the customer, and it is the first thing revisited at every quarterly review.

ROSTER ONE

The vendor's account team

Name, primary role, email, phone — every person on the vendor's side who touches the account, from the executive sponsor to the primary support analyst. If a name is not on this list, the customer should not be hearing from them unannounced.

ROSTERS TWO AND THREE

The customer's engagement team, and their business owners

The people who run the relationship day to day, and the executives and line owners whose outcomes it serves — each with a **named vendor peer**. The peer column is the point: nobody on the customer's side should be unsure who, on the vendor's side, is theirs.

The five components the rest of the document is organized around are introduced on page three of the template, in one line each, and they are the shape of the whole model:

1. **Account Management** — sales and business development, roadmap alignment, strategic expansion, contracting and invoicing.
2. **The Customer Success Executive** — one operating executive, the CSE, executing a unified customer experience across the entire vendor organization.
3. **Success Management** — the four plays and business consulting: objectives prioritized, impact measured, maturity modelled, success tracked.
4. **Customer Support** — a scalable support model, grounded in insight and measured on quality.
5. **Professional Services** — advanced configuration, customization, integration and custom development, delivered as projects and programs.

ON THE MISSION PARAGRAPH

The original opened with the vendor's mission in three lines. Keep that, and keep it to three lines: the customer did not buy the mission, but the people reading the framework are about to be asked to escalate, attend and score, and they deserve one paragraph of why the vendor thinks the relationship matters before the roles begin.

II • THE FRAMEWORK

The operating executive.

The Customer Success Executive — the CSE — is the heart of the model: one named person who sits at the centre of the vendor organization and presides over the partnership. It is the Operating Model's executive success management, given a name and an account. Account Management sells and expands; the CSE makes the vendor behave as one company.



LANE	LANE	LANE	LANE
Customer Support	Success Management	Professional Services	Account Management
<ul style="list-style-type: none"> Errors, standard configuration, administration User support and training The line to product for issues 	<ul style="list-style-type: none"> The four plays: the feedback cycle, business reviews, adoption workshops, success initiatives Business consulting 	<ul style="list-style-type: none"> Advanced configuration, customization, integration, enhancement Projects and programs Custom development 	<ul style="list-style-type: none"> Sales and business development Roadmap alignment Strategic expansion Contracting and invoicing

The CSE's charge is alignment, transparency and visibility for the customer's whole team. They advocate for the customer's business, strategic and technical needs inside the vendor, govern the three divisions that report through them, and own the continued care of the framework itself. The **executive sponsors** above them are C-level, executive and functional leaders on both sides, peering beyond the engagement; they provide air cover for the day-to-day and are not in it. **Escalation** is written per account, and simplified on purpose: for each track there is one person responsible for an escalation and accountable for resolving it, and the path from a project team to the CSE to an executive sponsor is three steps and no more. A customer who has to ask "who do I call?" has found a hole in the framework, and the fix is a name in the document, not a process.

II • THE FRAMEWORK

Standing meetings.

The CSE is in every partnership meeting. Four of them stand, and the framework says what each is for, so that none of them becomes the others.

MEETING	PURPOSE	FREQUENCY
Account tracking	Proactive management of issues and feedback; the status of every active project and initiative; the major strategic programs and tracks of work. Reporting out of all three.	Weekly
Product update	Proactive communication tied to releases, known issues, outages and maintenance — the vendor telling the customer before the customer finds out. Follows the release rhythm on page 11.	Per release, and as required
Support	Open cases and the feedback behind them; status and the steps to resolution; where escalation is warranted and how it will be timely. Operational, and kept so.	Weekly
Business review	Review and update the framework itself and the maturity model, with the business, operations and executive owners. The strategic meeting — the Business Review play, in its first form.	Quarterly, in person

BETWEEN THE MEETINGS

The executive dashboard

Account health in one shared, collaborative document: status, priority, condition and criticality of the work together, from high-visibility projects to escalated tasks. The CSE reviews it weekly with both companies' operating teams. It is the account's single shared view, and the reason the weekly meetings are short.

ABOVE THE MEETINGS

The steering committee

Proposed by the vendor, convened when the customer approves; executives, business owners and operational leads from both sides. It meets periodically — weekly, bi-weekly or monthly, by the account's cadence — and exists for joint prioritization, on a three-point charter: understand the customer's business objectives and challenges; review progress against the partnership's operating priorities and initiatives; amplify the impact of a healthy relationship by driving business results against the established success measures.

THE RULE

Operational stays operational

Support never becomes account tracking, and account tracking never becomes the business review. Each has a frequency because each has a different unit: a case, a project, a partnership. When a weekly meeting starts discussing strategy, the CSE moves it to the steering committee — and when a review starts discussing cases, the CSE moves it to the week.

II · THE FRAMEWORK

Six dimensions.

At every business review the vendor evaluates the relationship across six dimensions that describe both the breadth of the collaboration and the depth of its impact. The CSE presents, both companies contribute, and feedback or escalation on any dimension can raise its frequency for a quarter.

DIMENSION	THE QUESTION IT ASKS	EXAMPLES
Strategic alignment	What are the key business strategies, acquisitions or changes in the business, and how does the vendor work directly with the customer's team to stay aligned to them?	Acquisitions · a CRM implementation · mobile
Business impact	What is changing in the business that will need technology, and where are the gaps? What future opportunities and challenges are shaping the business process?	Sales productivity · recruiting efficiency · vendor integration
Roadmap synergy	A standing monthly review of recent roadmap changes; themes aligned across both organizations; the customer's requests collected and the threads that influence the roadmap identified.	Product evaluations · beta participation · pilots
Solution adoption	A review of application usage and platform metrics to identify trends and next steps.	Learning and development · workflow optimization
Support quality	Ticketing metrics, provided by the vendor, to identify trends and opportunities.	Backlog · ticket aging · resolution and response times
Program management	Every project currently in action between the two companies, services engagements and strategic projects alike.	Migrations · implementations · custom code

These six are the origin of the **Partnership Maturity Model** that the [Business Review](#) play scores on five levels, from ad hoc to market-leading. In 2016 they were questions; by 2022 each had a maturity scale and a radar chart, and the gap between the vendor's score and the customer's had become the agenda of the review. The questions came first, and they are still the right ones to ask before anyone scores anything.

WHY SIX, AND WHY THESE

Three are about the customer's business — alignment, impact, roadmap — and three are about the vendor's delivery — adoption, support, program. A review that only scores the second three is a report card; one that only discusses the first three is a sales call. The framework insists on both halves, in that order, every quarter.

II • THE FRAMEWORK

Support, promised in writing.

The framework commits the vendor to a support model the customer can see: who answers, in what order, how fast by severity, and what the words on a ticket mean. Customer Support is measured on resolution timelines and quality of service, and it says so.

TIER 1

Frontline

Support representatives resolve mainstay and frontline issues directly; otherwise they escalate, swiftly.

TIER 2

Dedicated analysts

A primary analyst named for the account, supported by secondaries who work alongside them — cross-trained, with deep knowledge of the customer's configuration and environment.

TIER 3

Engineers

Complex issues needing in-depth evaluation, analysis of technical impact and a synthesized solution; they partner with the Tier 2 analyst so that status and timeline stay clear to the customer.

BEYOND

Services and engineering

Issues in custom development go to the services team; issues needing changes to the product go to engineering, which reports status in a vocabulary the customer can read — below.

SEVERITY	DEFINITION	INITIAL RESPONSE	FOLLOW-UPS
Critical	Severe business impact: the platform is not operational, no workaround exists, all users affected.	Under one hour	Hourly
High	Impaired core functionality, significant business impact: functionality unavailable, workaround cumbersome or non-existent. Attention within one business day.	Under four hours	Daily
Non-critical	Does not require immediate attention.	Two days	Weekly

When a ticket leaves support for engineering, its status is one of six words, defined once and never redefined:

01

Engineering in progress

Assigned to a product engineer and being worked actively.

02

Queued for development

Validated as a bug and sent to the development team for triage.

03

Development · short term

Will be addressed in the short term — under about four months.

04

Development · long term

May be addressed in the long term.

05

Development in progress

Being actively resolved by the development team.

06

Queued for release

The work is complete and scheduled for release into the product.

The numbers in the severity table were the ones I published in 2016, and the opening paragraph of the framework said plainly that some of them were goals we were still reaching. Publish yours the same way: the real number, the real gap, and the date.

Services and releases.

Two more things the customer needs to see written down: what a services engagement looks like on the vendor's side, and how the product will change under them.

Professional services, as a program

Every strategic account's services work is led by a **program manager**, overseeing custom development, implementation and integration across the vendor's teams. Beneath the program: a dedicated **project manager** per engagement, accountable for scope on time and on budget; **technical development**, devising specifications and implementing the solution; **solutions architecture**, where architects and business analysts gather requirements, present them in a statement of work, and keep both companies aligned on outputs and outcomes; **quality assurance**, working in combination with the customer's own testers; and **data engineering**, keeping the customer's data captured, updated and maintained to a standard. The framework names the roles so the customer knows which to ask for — and so that "services" is never one person with a laptop.

Releases: publish the rhythm

The vendor updates the product on an ongoing basis for the whole user base; at the annual and quarterly reviews it may share elements of the roadmap to build alignment and drive adoption, subject to change. What the framework promises is not the roadmap but the **rhythm** — three stages, each with a communication, a touchpoint and an owner:

STAGE	WHAT HAPPENS	COMMUNICATION	TOUCHPOINT	OWNER
Notice	Two to three business days before a release reaches the sandbox: highlights, and a link to the detailed notes.	Email; the status site	Product marketing	The CSE
Early access	The release on the customer's sandbox or non-production environment, new features typically de-activated until requested; the customer reviews, updates its process documentation, plans training.	The status site	Customer support	The CSE
Production	Rollout begins the week after a successful sandbox release — roughly nine days' notice in all — on a schedule the release team sets; the sequence varies by cycle.	The status site	Customer support	The CSE

Enablement follows every release — training and onboarding staged in the months after, because a feature shipped is not a feature adopted. **Hotfixes** are the one exception to the rhythm, deployed with maintenance notices on the status site. My cadence was monthly, sandbox on a Tuesday and production on a Thursday; yours will differ, and the framework should carry yours, drawn as a calendar, because a customer who can see the month plans around it.

II • THE FRAMEWORK

The adoption program.

For enterprise customers the framework ends with a program, not a promise: adoption taken to the customer's offices, in chartered waves, with usage data behind it and a debrief after each. It is the strategic, reactive motion of the Operating Model — the adoption workshop — at its largest.

THE CHARTER

A memo per wave

At the start, the vendor documents expectations, activities, success criteria and outcomes — globally and on the ground. Each wave has a defined duration, a list of target sites and user populations, and the requirements of both companies' staff. At its end, a debrief decides the next iteration.

THE STRUCTURE

Centralized, with buy-in

Centralize the program through the customer's information-technology group, with each operating company or business unit's operations team partnering to resource its success. Two conditions: buy-in from top executives, globally and at each operating company; and a clear commitment from client stakeholders to participate, support and co-facilitate.

THE DATA

Usage, segmented

The vendor furnishes raw usage data — activity per user over a period, typically a month, across the entities of the system — and advises on reading it. It is most useful segmented and weighted by the workflows of each user type: a recruiter and a salesperson use different parts of the product, and one number for both hides both. Weekly or bi-weekly conversations about trends decide which sites get a visit.

Field visits

Led by the director of professional services with success managers and subject-matter experts as needed; a half-day per session; two kinds. An **intake visit** walks the floor, meets end users, holds an open forum or an observation session, and sees how the product is actually used in a production business environment. A **topical follow-up** brings specialists — product directors, industry thought leaders — to deliver targeted service, training and support on what the intake found. After each visit, captured notes; after each wave, a summary with evaluation, impact and recommendations. The goal is not only end-user productivity on the platform but the customer's business processes and efficiency, proactively.

Wave governance, in six steps

1. **Usage review** — an initial recommendation from jointly observed data, or an observation to gather a baseline.
2. **Operations alignment** — the customer engages the relevant unit and introduces the site's leadership; the vendor coordinates logistics.
3. **Charter audit** — both companies check the charter's resource requirements and re-execute it if needed.
4. **Adoption intake** — the intake session, in person or virtual, to validate observations and confirm needs.
5. **Observation deliverables** — shared notes from the end-user exchanges, the common knowledge base for what follows.
6. **Adoption engagement** — the selected user segments re-engaged with specialized, targeted service and support to optimize workflows and realize the benefit.

The first ninety days, and the checklist.

The framework is written with the customer, not sent to them. Ninety days from a blank template to a document both companies have reviewed together once.

WEEKS ONE TO THREE

Write it together

Name the CSE. Fill the three rosters, peer column complete. Sit with the customer's engagement team and write page two — their priorities, in their words, mapped to the components. Fill the severity table with real numbers and mark the goals. Draw the release rhythm as a calendar. Send the draft to the executive sponsor with the gaps named.

WEEKS FOUR TO EIGHT

Start the clock

Open the executive dashboard and review it weekly. Hold the first account-tracking and support meetings, and keep them to their units. Propose the steering committee and set its cadence. Draft the first adoption-wave charter from the first month's usage data. Fix the names the first escalation proved wrong.

WEEKS NINE TO THIRTEEN

The first review

The first business review, in person: page two re-read, the six dimensions asked as questions, the framework itself amended where it was wrong, the committee convened if approved. Leave with the next quarter's amendments written into the document, and a date for the next review.

WRITE

- ☐ One named operating executive
- ☐ Three rosters; every customer name with a vendor peer
- ☐ Page two: the customer's priorities, in their words
- ☐ Escalation: three steps, one owner per track
- ☐ Severity table with real numbers; goals marked as goals
- ☐ Six-state ticket vocabulary published
- ☐ Release rhythm drawn as a calendar
- ☐ Services roles named

EVERY WEEK

- ☐ Executive dashboard reviewed with both teams
- ☐ Account tracking held — issues, projects, programs
- ☐ Support held — cases only
- ☐ Product update sent before the customer asks

EVERY MONTH

- ☐ Roadmap changes reviewed (dimension three)
- ☐ Usage data delivered, segmented by user type
- ☐ Wave progress against its charter

EVERY QUARTER

- ☐ Business review held in person
- ☐ Six dimensions asked, then scored
- ☐ Framework amended and re-issued
- ☐ Steering committee met
- ☐ Wave debriefed; next wave chartered

EVERY YEAR

- ☐ Page two rewritten with the customer
- ☐ Service levels re-published, gaps re-dated
- ☐ Does everyone on both rosters know their peer?